

California Schools Healthy Air, Plumbing, and Efficiency (CalSHAPE) Online System

INTRODUCTION

Enacted by Assembly Bill 841 (Ting, Chapter 372, Statutes of 2020) in September 2020, the California Schools Healthy Air, Plumbing, and Efficiency (CalSHAPE) Program consists of two school grant programs – the Ventilation program and the Plumbing program. The Ventilation program provides funding to assess, maintain, and repair ventilation systems in public schools, prioritizing schools in underserved communities. The Plumbing program provides funding to replace aging and inefficient plumbing fixtures and appliances with water-conserving plumbing fixtures and appliances in public schools and state agency buildings, also prioritizing schools in underserved communities.

CalSHAPE Online is the online application and reporting system for the CalSHAPE Program. Local educational agencies (LEA) will use CalSHAPE Online to submit grant applications and final reporting packages for both the ventilation and plumbing programs. The instructions to register for a user account in CalSHAPE Online are provided below and include the following sections:

- Access CalSHAPE Online – p. 1
- Create New Account – p. 1
- Change Password – p. 7
- Manage Accesses – p. 9

These CalSHAPE Online Account Registration Instructions are provided for information purposes only and shall be used solely to assist users with account registration in CalSHAPE Online. CalSHAPE Program requirements can be found in the Ventilation and Plumbing program guidelines. The screenshot depictions are provided for demonstration purposes only and may not reflect actual CalSHAPE Online content. These CalSHAPE Online Account Registration Instructions, including screenshot depictions, should not be substituted for the information or instructions provided in CalSHAPE Online.

ACCESS CALSHAPE ONLINE

[CalSHAPE Online](https://calshape.energy.ca.gov) is located at <https://calshape.energy.ca.gov>. It may also be accessed by clicking the CalSHAPE Online link on the [CalSHAPE Program webpage](https://www.energy.ca.gov/programs-and-topics/programs/california-schools-healthy-air-plumbing-and-efficiency-program) at <https://www.energy.ca.gov/programs-and-topics/programs/california-schools-healthy-air-plumbing-and-efficiency-program>

CREATE NEW ACCOUNT

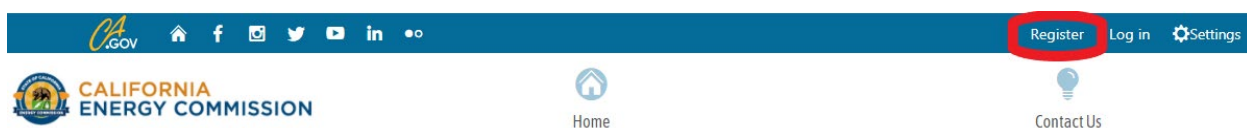
New users that do not already have a CalSHAPE Online account will follow the process described in this section to create an account. CalSHAPE Online allows for two separate types of users: LEA CalSHAPE Administrators and LEA Register Users.

CalSHAPE Online Account Registration Instructions

- LEA CalSHAPE Administrator – This role is reserved for LEA district staff and is limited to three users. LEA CalSHAPE Administrators can manage the LEA account and approve or reject user access requests. Additionally, LEA CalSHAPE Administrators can add, edit, view, and submit applications and reports.
- LEA Registered User – This role is open for any LEA staff, school staff, or contractors associated with the LEA. There is no limit to the number of users the LEA can add as a registered user. Registered users can add, edit, view, and submit applications and reports.

To create a new account, an authorized representative of the LEA will follow the steps listed below.

1. Click the "Register" button in the upper right corner of the home screen.



2. Input the LEA code for the school district or charter school and click "Submit".
For school districts, the LEA code is the school district code plus 7 zeros (ex. 12345670000000). For charter schools, the LEA code is the same as the school's CDS code.

A screenshot of the registration form on the CalSHAPE website. The form is titled 'Please type in the LEA code:' and has a text input field. Below the input field, there is a 'Submit' button, which is highlighted with a red circle. Above the form, there is a progress bar with four steps: 'District Or Charter Information', 'Role', 'Terms & Conditions', and 'Account Information'. The first step is currently active, indicated by a blue dot. The website header is visible at the top, showing the 'CALIFORNIA ENERGY COMMISSION' logo and navigation links.

CalSHAPE Online Account Registration Instructions

- To verify that the correct LEA code was entered, the system will generate a list of possible LEAs. In this example, we are using the Del Mar Union Elementary LEA code. Select the correct school district or charter school name and click "Verify".

District Or Charter Information

Please type in the LEA code:

Please select the corresponding district or charter name:

- ☐ Junction Elementary
- ☐ Standard Elementary
- ☐ Fenton STEM Academy: Elementary Center for Science Technology Engineering and Mathematics
- ☐ California Montessori Project-San Juan Campuses
- ☒ Del Mar Union Elementary
- ☐ None of the above

- Next, select a user role: LEA CalSHAPE Administrator or LEA Registered User. Descriptions of these roles are displayed on the CalSHAPE Online screen and are also provided in these instructions, above. Select the applicable user role and click "Continue"

District Or Charter InformationRoleTerms & ConditionsAccount Information

LEA CalSHAPE Administrator (Limit 3) – e.g. school district or charter school staff

- Manage LEA account, approve/reject user access requests
- add/edit/view/submit applications and reports

LEA Registered User – e.g. school district/charter school staff/contractor

- add/edit/view/submit applications and reports

☒ LEA CalSHAPE Administrator ☐ LEA Registered User

CalSHAPE Online Account Registration Instructions

5. Read the Terms and Conditions and click "I Agree & Continue"

By using this California Schools Healthy Air, Plumbing, and Efficiency (CalSHAPE) Online System, you signify your assent to these terms of use. If you do not agree to them, please do not use the site. User expressly acknowledges that use of this site is at user's sole risk.

You hereby expressly acknowledge and agree to the following terms and conditions: CalSHAPE Online System is the property of the California Energy Commission (CEC), an agency of the State of California, and may only be accessed by authorized users. Conducting or facilitating the unauthorized access, use, disruption, modification, or destruction of CalSHAPE Online System is strictly prohibited and may subject you to criminal liability under various state laws, including California Penal Code Section 502, and may also subject you to civil liability.

The CEC may monitor any activity or communications on CalSHAPE Online System and retrieve any information stored within CalSHAPE Online System. By entering CalSHAPE Online System, you are consenting to such monitoring and information retrieval for law enforcement and other governmental purposes, including for purposes of conducting civil and criminal investigations and initiating legal actions.

Any information or communications created, maintained, and/or stored within CalSHAPE Online System, including information stored centrally, locally on a disk drive, or on removable electronic storage media, will become public records subject to disclosure under the California Public Records Act (Government Code Section 6250 et seq.). By accessing and using CalSHAPE Online System you expressly agree to conduct any and all transactions with the CEC under the CalSHAPE program electronically within CalSHAPE Online System, including sending and receiving communications to and from the CEC concerning your participation in the CalSHAPE program, including participation related to grant applications, eligibility, funding awards, reporting, and other important matters.

You acknowledge that you have read and understood the CEC's CalSHAPE Ventilation Program Guidelines and CalSHAPE Plumbing Program Guidelines. You acknowledge that any grant application approval from the CEC is conditioned on the local educational agencies' (LEA) acceptance and ongoing satisfaction of all CalSHAPE program requirements, including those as set forth in the CalSHAPE Ventilation Program Guidelines and CalSHAPE Plumbing Program Guidelines.

You further acknowledge that the CEC may revise the CalSHAPE Ventilation Program Guidelines and/or CalSHAPE Plumbing Program Guidelines in the future and it is your responsibility to remain informed of any changes to the CalSHAPE Ventilation Program Guidelines and CalSHAPE Plumbing Program Guidelines that could affect applicant eligibility or any other part of the CalSHAPE program. You hereby declare under penalty of perjury that the information you provide within CalSHAPE Online System, including any documents, is true and correct to the best of your knowledge and that you are authorized to submit this information using CalSHAPE Online System on behalf of the LEA.

I Agree & Continue Cancel

6. Fill out the account information fields as prompted. Use a password with more than 15 characters that contains an upper case letter, a number, and a special character (_, #, %, *, @, \$, &, =, !).

Account Information

First Name

Last Name

Title ?

LEA Relationship ?

Phone Number

Email

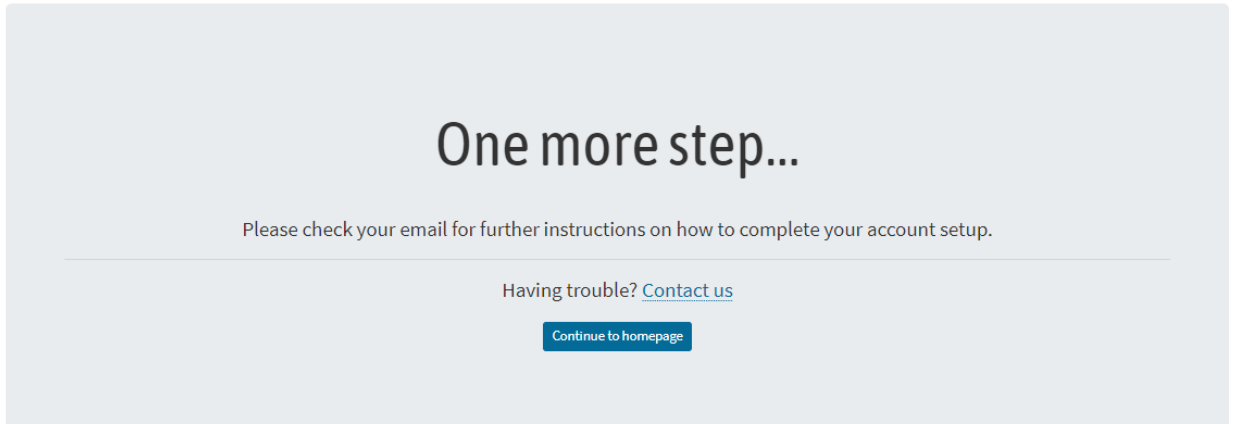
Password

Confirm password

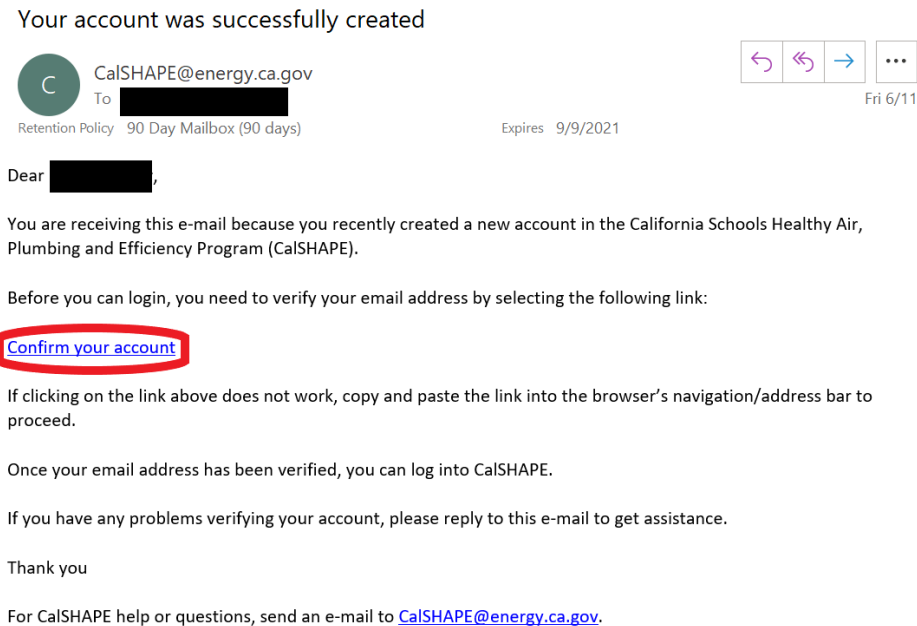
Register

CalSHAPE Online Account Registration Instructions

- After registering, this page will appear with a prompt to check your email for further instructions.



- Open the email sent from CalSHAPE@energy.ca.gov and click the link to verify the email address. The automatically generated email that is received will look like the one below:



- After clicking the link in the automatically generated email, a message will be displayed stating that the account has been confirmed. Click the link to go to the login page.

Account Confirmation.



Thank you for confirming your account. Click [here](#) to login

10. This link will redirect to the login page. Enter the email address and password and click "Log In" to proceed.



Email Address
Enter a valid email address

Password
Enter password

☐ Remember me? [Forgot your password?](#)

Log in

Don't have an account? [Register](#)

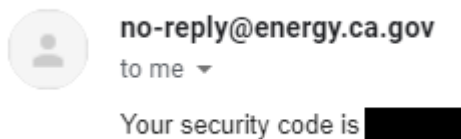
11. After logging in, the system will prompt you to complete the two-factor authentication process. Select "Email Code" and click "Submit".

Two-Factor Authentication.

Send verification code

Select Two-Factor Authentication Provider: Email Code **Submit**

12. Check your email for an automatically generated message from no-reply@energy.ca.gov containing a 6-digit authentication code.



13. Enter the code in CalSHAPE Online and click "Submit".

Two-Factor Authentication.

Enter verification code

Remember Browser☐

Submit

14. After logging in, your email address will be visible in the upper righthand corner of the screen. The "Manage" and "Application" menu options will now be available as well.



CHANGE PASSWORD

This section provides instructions on how to change the password for the CalSHAPE Online account.

1. To view and edit your account information, click "Manage".



2. The Manage menu will display the options to view profile information, change password, or approve/deny user access. Click "Manage Profile" to proceed. Please note that this screenshot shows the LEA CalSHAPE Administrator account options. LEA Registered Users will not have the Manage Access panel and only the Manage Profile panel will be displayed.



CalSHAPE Online Account Registration Instructions

3. Clicking this link will display the Manage Account detail page along with personal account information. To change your password, click "Change".

Manage Account.

FIRST NAME	████
LAST NAME	████
EMAIL	████████████████
PHONE NUMBER	██████
TITLE	test
LEA RELATIONSHIP	test

Password: [Change](#)

4. On the next page, enter the current password along with a new password that meets the system requirements. Enter the new password a second time to confirm and click "Change Password".

Manage Password.

Change Password Form

Current password	<input type="password"/>
New password	<input type="password"/>
Confirm new password	<input type="password"/>
Change Password	

5. The system will return to the Manage Account page with a message confirming that the password has successfully been changed.

Manage Account.

Your password has been changed.

FIRST NAME	████
LAST NAME	████
EMAIL	████████████████
PHONE NUMBER	██████
TITLE	test
LEA RELATIONSHIP	test

Password: [\[Change\]](#)

MANAGE ACCESS

This section describes how to grant or request access to an LEA's applications. When an LEA Registered User account is created with an LEA code, an access request is automatically sent to the LEA CalSHAPE Administrator for that LEA. The LEA CalSHAPE Administrator grants access to LEA Registered Users as part of the account setup process. This section will describe instructions for both LEA CalSHAPE Administrators and LEA Registered Users.

LEA CalSHAPE Administrators

1. LEA CalSHAPE Administrators will receive an automatically generated email notifying them of a new access request from an LEA Registered User. To view and approve or reject the access request, click "Manage".



2. Click "Manage Access" to view pending access requests.



3. This will lead to the Access Requests List menu where all access requests for the LEA code can be viewed. Click "Edit" to view more information about a specific request.

Access Requests List

Filter: <input type="text" value="Enter a LEA code or user's email"/>					
LEA Code	Name	Email	Title	Status	
3467314000000	[redacted]	[redacted]	Assistant to the Regional Manager	Pending	<div>Edit</div>

CalSHAPE Online Account Registration Instructions

- This page contains basic contact and occupation information on the LEA Registered User that submitted the request. Click “Approve” to grant the LEA Registered User permission to access the LEA’s applications. To deny a request, click “Reject”.

Manage access permission to your district / charter applications. [Learn more](#)

Approve

Reject

Basic info	
NAME	██████████
TITLE	Assistant to the Regional Manager
RELATIONSHIP	AARM

Contact info	
EMAIL	██████████
PHONE	██████████

- After clicking “Approve”, the system will return to the Access Request List. The system will generate a message confirming that the user can now access the LEA’s applications. Please note that the request status has changed from “Pending” to “Approved” as well

Update success. The user '██████████' can now access your applications.

Access Requests List

Filter:	Enter a LEA code or user's email				Q
LEA Code	Name	Email	Title	Status	
34673140000000	██████████	██████████	Assistant to the Regional Manager	Approved	Edit

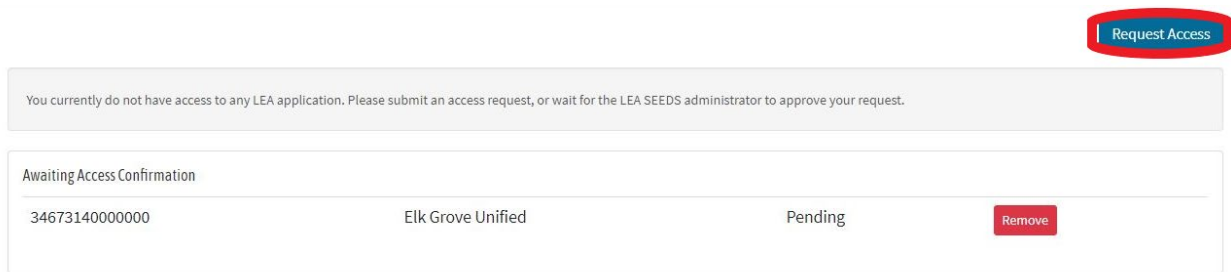
LEA Registered Users:

- To request access to another LEA, begin the process by clicking “Application” on the main menu. Please note: the system automatically sends an access request to the LEA CalSHAPE Administrators for the LEA code that is entered when creating an LEA Registered User account, so the instructions provided below do not need to be followed to request access to that LEA’s application.

CalSHAPE Online Account Registration Instructions



2. On the Application menu, all pending, approved, and rejected access requests will be visible. Please note that the automatically generated access request will appear here when accessing this page for the first time. To request access to another LEA, click "Request Access".



3. Enter the LEA code for the school district or charter school and click "Submit". For school districts, the LEA code is the school district code plus 7 zeros (ex. 12345670000000). For charter schools, the LEA code is the same as the school's CDS code.

The image shows two versions of the 'Submit An Access Request' form. The first form has an empty text field for the LEA code and a 'Submit' button. The second form shows the same text field filled with the code '01612590108944', and the 'Submit' button is circled in red.

4. To verify that you have entered the correct LEA code, the system will generate a list of possible LEAs. In this example, we are using the Lighthouse Community Charter High LEA code. Select the correct school district or charter school name and click "Verify".

CalSHAPE Online Account Registration Instructions

Submit An Access Request

Please type in the LEA code:

Please select the corresponding district or charter name:

- ☐ Buttonwillow Union Elementary
- ☐ Gold Trail Union Elementary
- ☐ HomeTech Charter
- ☐ Aveson Global Leadership Academy
- ☒ Lighthouse Community Charter High
- ☐ None of the above

5. Read the terms and conditions and click "Submit Access Request".

Terms and Conditions

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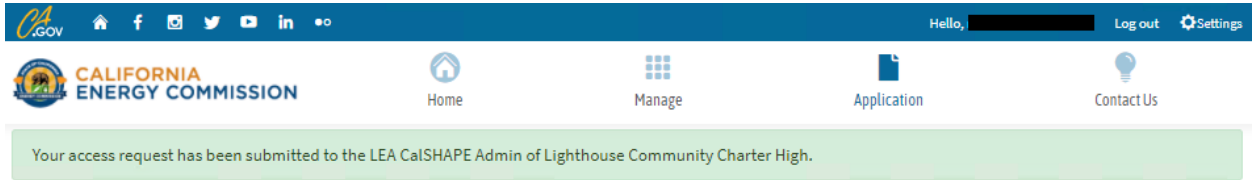
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- Once you have submitted the request, the system will return to the Submit an Access Request page. An email will be sent to the LEA CalSHAPE Administrator for that LEA code notifying them of the pending access request. The system will display a message confirming that the request has been submitted.



Submit An Access Request

Please type in the LEA code:

- If the request is approved by an LEA CalSHAPE Administrator, you will receive a notification email confirming approval. You will now be able to view information for that LEA under the Application menu, including the LEA CalSHAPE Administrator contact information, total number of schools and number of schools that meet underserved community eligibility criteria. From here, you will be able to start an application for the ventilation or plumbing programs when the programs begin accepting applications.

Lighthouse Community Charter High
LEA Code: 01612590108944

Contact	Total	Schools Underserved
[redacted]	1	1

Applications

HVAC

Not Yet Started

Plumbing

Not Yet Started

[Start An \(HVAC / Plumbing\) Application](#)

